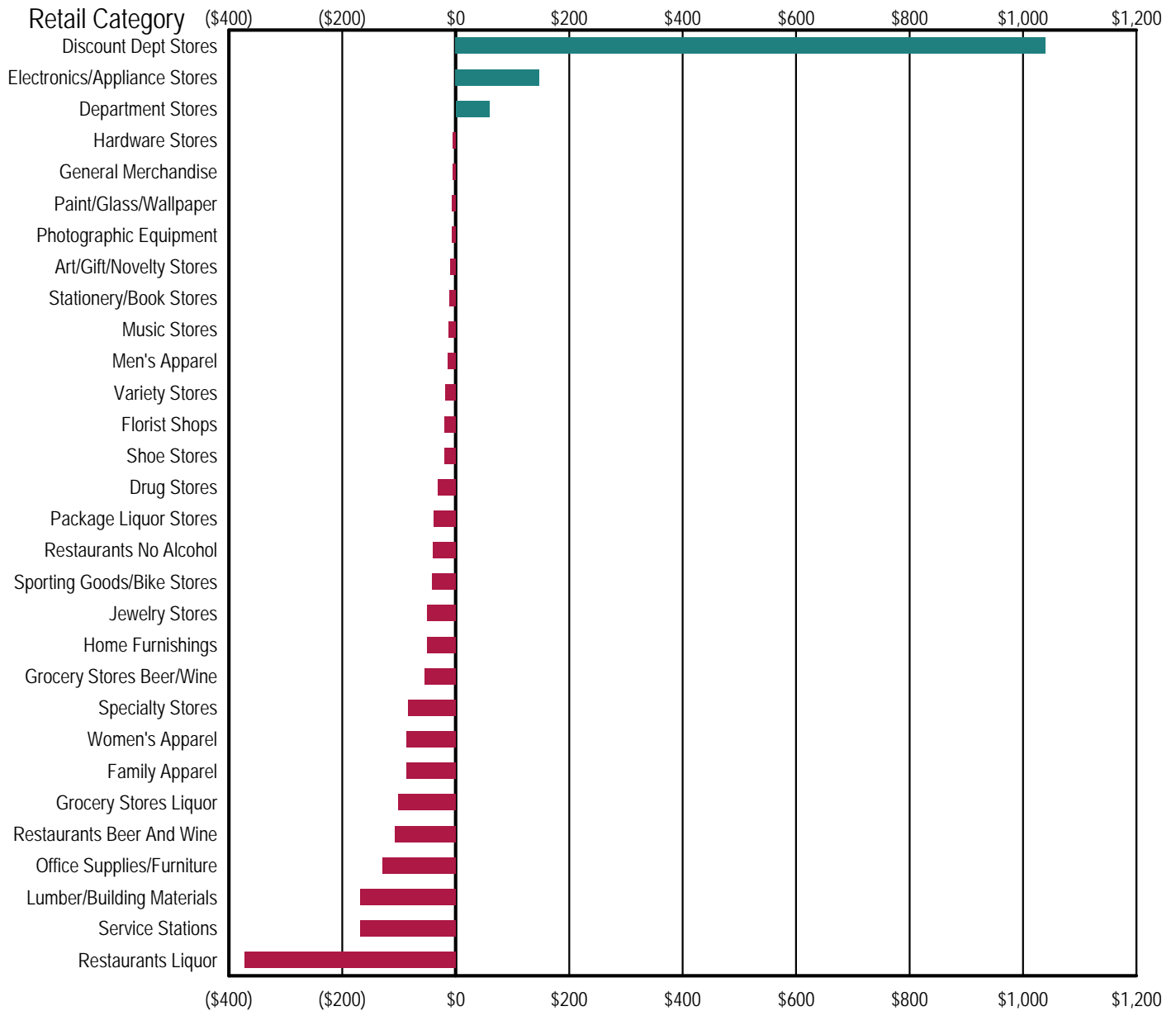


# CITY OF CHULA VISTA

## PER CAPITA SALES TAX SURPLUS/GAP COMPARISON - FISCAL YEAR 2012-13



The above graph compares **per capita** sales tax generated from targeted retail categories against countywide averages. A **retail surplus** suggests the community is capturing its local market for that category of goods plus attracting shoppers from outside the jurisdiction. A **retail gap** suggests the possibility that residents may have a greater demand for products in the specific category than is being satisfied by local businesses. The information is provided only as a **starting point** in identifying potential sources of sales tax loss and should not automatically be interpreted as an expansion or leveraging opportunity without more detailed analysis and assessment.

# CITY OF CHULA VISTA

## PER CAPITA SALES TAX SURPLUS/GAP COMPARISON - FISCAL YEAR 2012-13

| Retail Category              | Per Cap Sales<br>Capture (+) or Gap (-) | Sales Tax<br>Deviation | Typical Sales Per<br>Sq Ft by Retail Type | Approx Sq Ft to<br>Close Gap |
|------------------------------|---|------------------------|---|------------------------------|
| Discount Dept Stores         | \$1,040                                 | \$2,616,901            | \$475                                     | n/a                          |
| Electronics/Appliance Stores | 147                                     | 370,098                | 500                                       | n/a                          |
| Department Stores            | 59                                      | 148,955                | 175                                       | n/a                          |
| Hardware Stores              | (5)                                     | (12,354)               | 225                                       | 5,000                        |
| General Merchandise          | (5)                                     | (13,663)               | 100                                       | 14,000                       |
| Paint/Glass/Wallpaper        | (6)                                     | (15,223)               | 250                                       | 6,000                        |
| Photographic Equipment       | (7)                                     | (17,890)               | Insufficient data                         | Insufficient data            |
| Art/Gift/Novelty Stores      | (9)                                     | (23,501)               | 150                                       | 16,000                       |
| Stationery/Book Stores       | (12)                                    | (29,263)               | 200                                       | 15,000                       |
| Music Stores                 | (13)                                    | (32,785)               | 200                                       | 16,000                       |
| Men's Apparel                | (14)                                    | (35,981)               | 225                                       | 16,000                       |
| Variety Stores               | (18)                                    | (46,523)               | 100                                       | 47,000                       |
| Florist Shops                | (19)                                    | (48,259)               | 150                                       | 32,000                       |
| Shoe Stores                  | (20)                                    | (51,128)               | 200                                       | 26,000                       |
| Drug Stores                  | (32)                                    | (79,409)               | 350                                       | 23,000                       |
| Package Liquor Stores        | (39)                                    | (97,500)               | Insufficient data                         | Insufficient data            |
| Restaurants No Alcohol       | (40)                                    | (101,878)              | 650                                       | 16,000                       |
| Sporting Goods/Bike Stores   | (42)                                    | (105,728)              | 225                                       | 47,000                       |
| Jewelry Stores               | (50)                                    | (126,788)              | 500                                       | 25,000                       |
| Home Furnishings             | (51)                                    | (127,291)              | 175                                       | 73,000                       |
| Grocery Stores Beer/Wine     | (55)                                    | (137,657)              | 175                                       | 79,000                       |
| Specialty Stores             | (84)                                    | (212,085)              | 175                                       | 121,000                      |
| Women's Apparel              | (87)                                    | (218,903)              | 375                                       | 58,000                       |
| Family Apparel               | (87)                                    | (218,954)              | 375                                       | 58,000                       |
| Grocery Stores Liquor        | (101)                                   | (255,287)              | 110                                       | 232,000                      |
| Restaurants Beer And Wine    | (107)                                   | (268,848)              | 575                                       | 47,000                       |
| Office Supplies/Furniture    | (128)                                   | (322,618)              | 225                                       | 143,000                      |
| Lumber/Building Materials    | (168)                                   | (422,559)              | 300                                       | 141,000                      |
| Service Stations             | (168)                                   | (422,685)              | n/a                                       | n/a                          |
| Restaurants Liquor           | (372)                                   | (937,158)              | 575                                       | 163,000                      |

Average sales per square foot are based on HdL's overview of average statewide chain store sales. The square footage needed to close the gap is only on approximation and specific demand will vary with regional and local market conditions and individual retailers.